erwin Data Modeler

DM Connect for DI

Release 14.0

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DM Connect for DI Overview

erwin now offers an integration, DM Connect for DI, between two powerful products, erwin Data Modeler erwin DM) and erwin Data Intelligence (erwin DI). This offering enables you to maintain a single metadata and glossary source across erwin DM and erwin DI using erwin Mart Portal as an interface. Apart from this, DM Connect for DI offers the following benefits:

- Use data models as a foundation for data governance initiatives
- Automatically update data catalog
- Maintain a business glossary based on naming standards

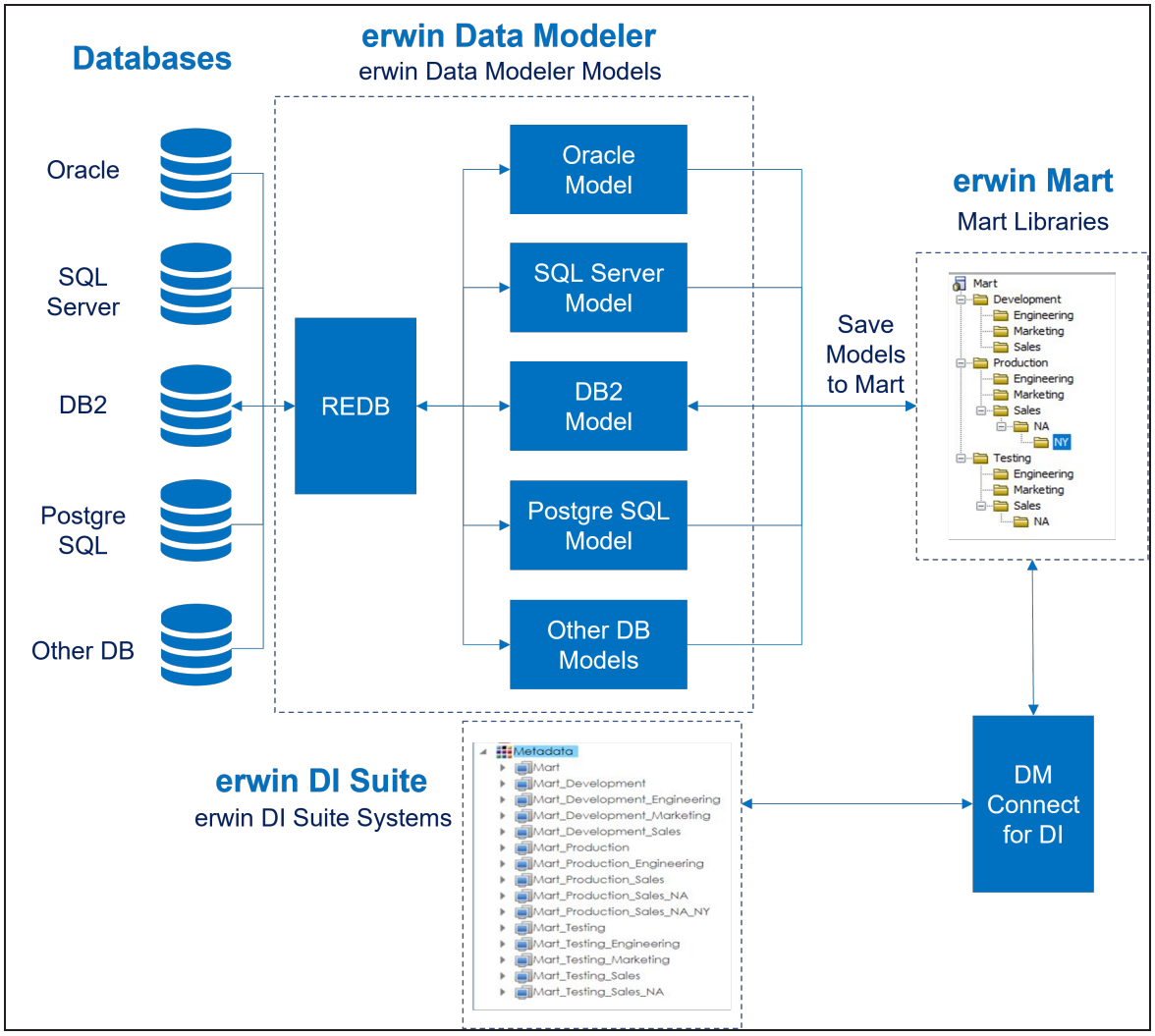
Workflow

erwin DM supports several target databases. It provides a powerful and robust workspace to create rich data models based on these target databases. Further, it provides connectivity to erwin Mart Portal; where you can store your rich data models in a mart repository.

erwin Mart Portal acts an interface between erwin DM and erwin DI. It enables you to schedule jobs to export data models and data sources from your mart repository to erwin DI Data Catalog and vice versa. Further, it integrates the naming standards set up on your models into the Business Glossary Manager.

erwin DI enables you to use your data models as a foundation for your data governance initiatives. It enables you to maintain a semantic lineage between metadata and business objects.

To summarize, erwin Data Modeler, erwin Mart Portal, and erwin DI work together as follows.



The following table explains the erwin DM, erwin Mart Portal, erwin DI version compatibility:

Products-Versions	erwin DI 12.1	erwin DI 13.0	erwin DI 14.0
erwin Mart Portal 2021R1	No	No	No
erwin Mart Portal 12.0	No	No	No

Products-Versions	erwin DI 12.1	erwin DI 13.0	erwin DI 14.0
erwin Mart Portal 12.1	Yes	Yes	No
erwin Mart Portal 12.5	No	Yes	Yes
erwin Mart Portal 12.5.1	No	Yes	No
erwin Mart Portal 12.5.2	No	Yes	Yes
erwin Mart Portal 14.0	No	No	Yes

Prerequisites

Before configuring erwin DM Connect for , ensure that the prerequisites for erwin Mart Portal and erwin Data Intelligent (erwin DI) are in place:

- System requirements:
  - erwin Mart Portal
  - erwin DI
- Permissions:
  - erwin Mart Portal
  - erwin DI
- erwin DI DocumentsPath

erwin Mart Portal System Requirements

Refer to the following tables for minimum system requirements:

Parameter	Requirement	Additional Information

Hardware/Workstation	• VM or Dedicated Physical Server
	• Windows-based workstation
	• 100 GB of disk space or more as required to support your specific mart
	• Processor - 64-bit, minimum 4 cores
	• RAM:
	  • **Only erwin Mart Portal**: 16 GB
	  • **Both erwin Mart Portal and erwin ER360**: 32 GB	

Operating System	• Microsoft Windows Server 2016 • Microsoft Windows Server 2019 • Microsoft Windows Server 2022 • All current Microsoft Windows critical updates	

Parameter	Requirement	Additional Information
Database	• Microsoft SQL Server 2017, 2019, and 2022. You can also use Microsoft SQL Azure and Amazon RDS SQL Server. • Oracle 18c, 19c, 21c, and Oracle Cloud • PostgreSQL 12.x, 13.x, 14.x, 15.x, and 16.x. You can also use PostgreSQL for Amazon RDS. • For DM Connect for DI, the minimum SQL Server version requirement is SQL Server 2016 SP2	**SQL Server**: • The Mart Portal can use a standalone or can share an existing database server for a Microsoft SQL Server. • The SQL Server 2017 and 2019 TRUSTWORTHY database property is no longer required for the mart. After you install this product, you can optionally reset this property to OFF. • The database user account that is used to configure the Mart must have the dba_owner role assigned. • (Optional) To use the Korean language, use

Parameter	Requirement	Additional Information
		the Korean_wansung_CI_AS character set. Select the character set while creating the Mart database (in the Collation field). For more information, see the SQL Server documentation. **Oracle**: • The Mart Portal can use a standalone or can share an existing database server for an Oracle database. You can also use a pluggable database. • To create the Mart, you must be the database schema owner user and you must have the DBA role in the

Parameter	Requirement	Additional Information

		target database on the Oracle server. The DBA role is required for the user who is specified in the Configure Mart Portal dialog. If the DBA privilege of this user is revoked, then erwin DM users will not be able to save model changes to the Mart.
		• (Optional) You have modified the following parameters in the initialization file (InitSID.ora):
		`Remote_OS_Authent=T`
		`OS_Authent_Prefix=TRUE`
		• (Optional) To use the Korean language with the Mart database, use

Parameter	Requirement	Additional Information
		KO16MSWIN949 or AL32UTF8 character set depending on your operating system language pack. For more information, see the Oracle documentation. • If the Mart database is an Oracle database, the default tablespaces that were used for initializing any earlier release of r9 series Mart are available for the latest release. **PostgreSQL**: • The Mart Portal can use a standalone or can share an existing database server for Post-

Parameter	Requirement	Additional Information
		greSQL. • The database user account that is used to configure the Mart must have super user permissions.
erwin Mart Portal Web Client - Browser	Latest versions of the following browsers: • Microsoft Edge • Mozilla Firefox • Google Chrome • Apple Safari	
Web Client Workstation	• Processor - i3 or higher • RAM - 8 GB minimum • Minimum Free Space - 1-2 GB	
Web Server	Apache Server 2.4.62	
JDK	17.0.12	
MartPortal Services	In the C:\Program Files\erwin\Mart Portal\create_service.cmd, update the RAM size setting to increase the RAM in MBs: reg add "HKLM\SYSTEM\CurrentControlSet\Services\erwinMartPortal\Parameters" /v Application /d "\"%JRE_HOME%\bin\java.exe\" -Xms2048m -Xmx10240m -Dlogging.config=\"file:C:\Program Files\erwin\Mart Portal\MartApp\config\log4j2-portal.xml\" -jar \"C:\Program Files\erwin\Mart Portal\MartApp\MartPortal.jar\"" That is, (2GB -10GB)	

Parameter	Requirement	Additional Information
ER360 Services	In the C:\Program Files\erwin\Mart Portal\create_service.cmd, update the RAM size setting to increase the RAM in MBs as follows: reg add "HKLM\SYSTEM\CurrentControlSet\Services\erwinER360\Parameters" /v Application /d "\"%JRE_HOME%\bin\java.exe\" -Xms2048m -Xmx10240m -Dlogging.config=\"file:C:\Program Files\erwin\Mart Portal\MartApp\config\log4j2-er360.xml\" -jar \"C:\Program Files\erwin\Mart Portal\MartApp\ER360.jar\"" That is (2GB - 10GB)	
Vault Services	In the C:\Program Files\erwin\Mart Portal\create_service.cmd, update the RAM size setting to increase the RAM in MBs: reg add "HKLM\SYSTEM\CurrentControlSet\Services\erwinVaultService\Parameters" /v Application /d "\"%JRE_HOME%\bin\java.exe\" -Xms2048m -Xmx4096m -Dlogging.config=\"file:C:\Program Files\erwin\Mart Portal\MartApp\config\log4j2-vaultservice.xml\" -jar \"C:\Program Files\erwin\Mart Portal\MartApp\vaultservice.jar\"" That is, (2GB -4GB)	

Ensure that you always install erwin Mart Portal on Windows operating system.

erwin DI System Requirements

Parameter	Requirement
Hardware/Workstation	• VM or Dedicated Physical Server • Processor - 64-bit, minimum 4 cores • RAM:

Parameter	Requirement
	• 16 GB for limited user POCs • 32-64 GB for enterprise production deployment • Hard Disk Drive - 200-300 GB
Operating System	• Microsoft Windows - Windows Server 2016 and above • Linux v4.19 and above • RHEL 8.0 and 8.5 • Amazon Linux 2
Database	• SQL Server 2016, 2017, 2019 > For DM Connect for DI, the minimum SQL Server version requirement is SQL Server 2016 SP2 • Oracle 12c, 18c, 19c
Browser	• Microsoft Edge v86x or newer • Google Chrome v86.0 or higher • Mozilla Firefox v82.0 or higher
Web Servers	Apache Tomcat v9.0.58
Web Server Memory Allocation	Allot at least 50 percent of available memory. For example, if available memory is 16GB, allot at least 8GB.
Web Client Workstation	• Processor - i3 or higher • RAM - 8GB minimum • Minimum Free Space - 1-2GB

In case of enterprise deployment, for the best performance, it is recommended to allot at least 0.5 GB space per user on the application server. For example, if 30 users log on simultaneously, the application server must have at least 15 GB of RAM allocated to it.

> The above RAM allocation does not indicate the RAM of the server machine. It indicates the physical RAM allocation to the application server.

Database Server Specifications

The following table lists database server specifications:

Parameter	Requirement
Server Type	Dedicated standalone server
Processor	64-bit, minimum 4-8 cores
RAM	32 GB
Hard Disk Drive	250-500 GB
Tablespace	50 GB, minimum

> erwin DI requires a dedicated schema/database (SQL Server or Oracle) with at least 50 GB tablespace allocated to it, which increases exponentially based on usage.

Permissions

To use DM Connect for DI, you need certain permissions on erwin Mart Portal and erwin Data Intelligence (DI).

Minimum erwin Mart Permissions

You can use DM Connect for DI only if your account has been assigned the following profiles:

- Administrator
- Architect

Minimum erwin DI Permissions

Metadata Manager
Create System

Prerequisites

Metadata Manager
Systems/System Tabs/View System Details
List Systems
Systems/Add Environment
Systems/List Environments
Systems/System Environments/Import Environment
Systems/System Environments/New Version
Systems/System Tabs/View Environment Details
Systems/Configure Expanded Logical Name
Systems/System Environments/Environment Tabs/Extended Properties/Edit Extended Properties
Systems/System Environments/Scan Metadata
Systems/System Environments/Environment Tabs/EnvironmentDetails

Mapping Manager
Projects/Create Project
Projects/Mappings/Create Mapping
Projects/Project Tabs/Project Details/View Project Details
Projects/Mappings/Mapping Grid/Edit Mapping Specification Grid (Any one permission in child permissions)

Business Glossary Manager
Custom Objects/Catalog/Create
Custom Objects/Catalog/Edit

Business Glossary Manager
Custom Objects/Catalog/View
Custom Objects/Catalog/Custom Objects/Create
Custom Objects/Catalog/Custom Objects/Edit
Custom Objects/Catalog/Custom Objects/View
Custom Objects/Import Catalog

erwin DI DocumentsPath

To be able to export data from erwin Data Modeler (DM) to erwin DI , ensure that you update the **iccdocuments.properties** file in erwin DI as follows:

- **Windows**: If you change the default installation location, follow these steps:

  1. Open the **iccdocuments.properties** file from the following location:
     Apache Software Foundation\Tomcat 8.5\webapps\<Application Name>\WEB-INF\-configuration\properties\iccdocuments.properties
  2. Change the **DocumentsPath** value to the current installation location:
     <drivename>:/<application name>

  For example, consider you changed the installation location from the default location to:
  D:\Apache Software Foundation\Tomcat 8.5\webapps\erwinDISuite\WEB-INF\-configuration\properties.
  Then, change the **DocumentsPath** to:
  D:/erwinDISuite

- **Linux**: Ensure that you follow these steps:

  1. Open the **iccdocuments.properties** file from the following location:
     /opt/tomcat/webapps/<<erwinDISuite>>/WEB-INF/-configuration/properties/iccdocuments.properties
  2. Change the **DocumentsPath** value to:
     opt/tomcat/<application name>

  For example, change the **DocumentsPath** from *C:/MappingManager* to:

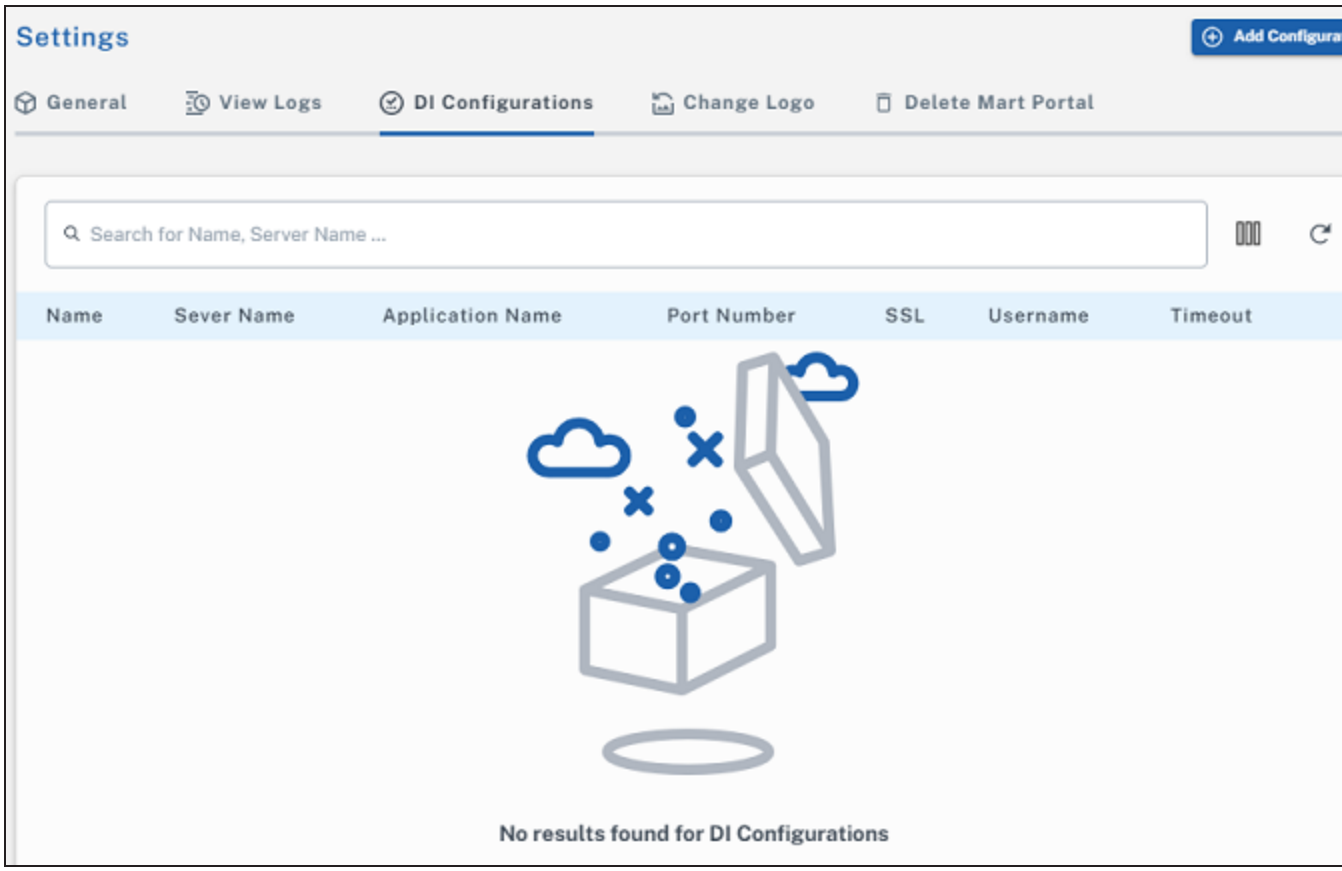
opt/tomcat/erwinDISuite

Configuration

To import and export data models, data sources, and naming standards using DM Connect for DI, you need to configure your erwin Data Intelligence (erwin DI) application in erwin Mart Portal.

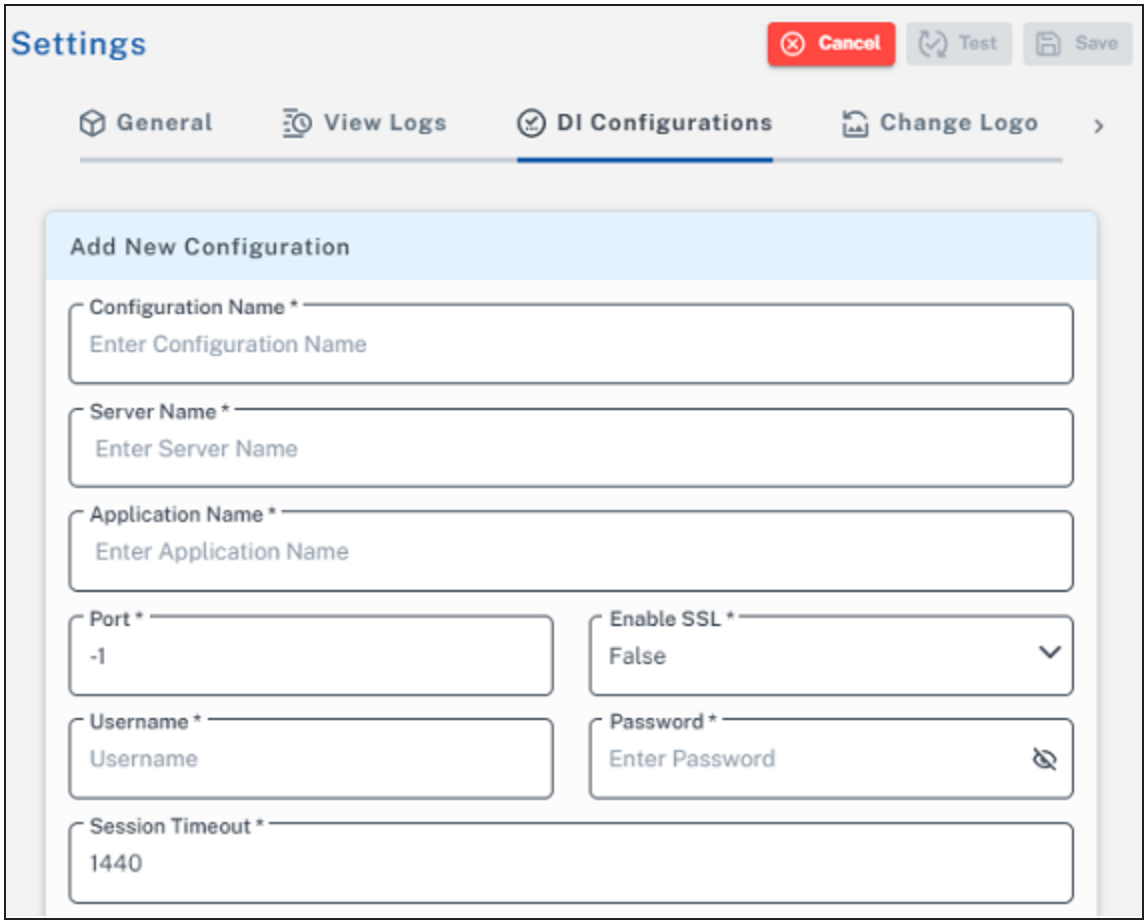
To configure erwin DI, follow these steps:

1. Go to **Application Menu** > **Settings** > **DI Configurations**.
   The DI Configurations page appears.



2. Click **Add Configuration**.

   The Add New Configuration section appears.



3. Configure your erwin DI connection parameters as follows:

Field	Description
Configuration Name	Specify a unique name for the configuration
Server Name	Specify the server address, where erwin DI is installed
Application Name	Specify the name of your erwin DI Application
Port	Specify the port on your server that is used for erwin DI

Field	Description
Enable SSL	Specify whether you want to connect to the server through a secured connection
Username	Specify your erwin DI user name
Password	Specify your erwin DI password
Session Timeout	Specify erwin DI's session time out duration in minutes

4. Click **Test**.
5. Click **Save**.
   Your connection is tested and saved. You can set up multiple erwin DI configurations and use them as required.

Scenario: Schedule Jobs to Export Data Models to erwin DI

An Export to DI job converts a model to erwin DI compatible format and then,

- exports the model to the Metadata Manager
- exports the source and target column data from a dimensional model into the Mapping Manager

  > Once source and target column data is exported, any updates made to them are not exported when the job runs again.

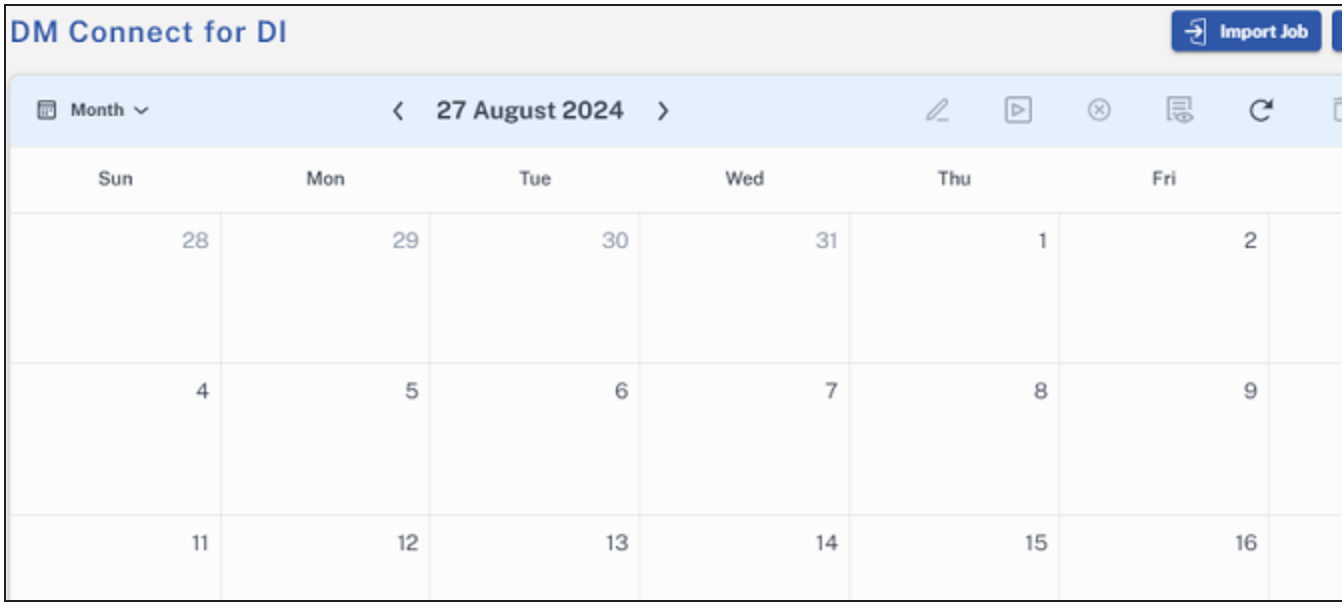
- If the model has an associated NSM file, it exports the file to the Business Glossary Manager

For more information about data sharing between erwin Data Modeler (erwin DM) and erwin Data Intelligence(erwin DI), refer to the Data Sharing topic.

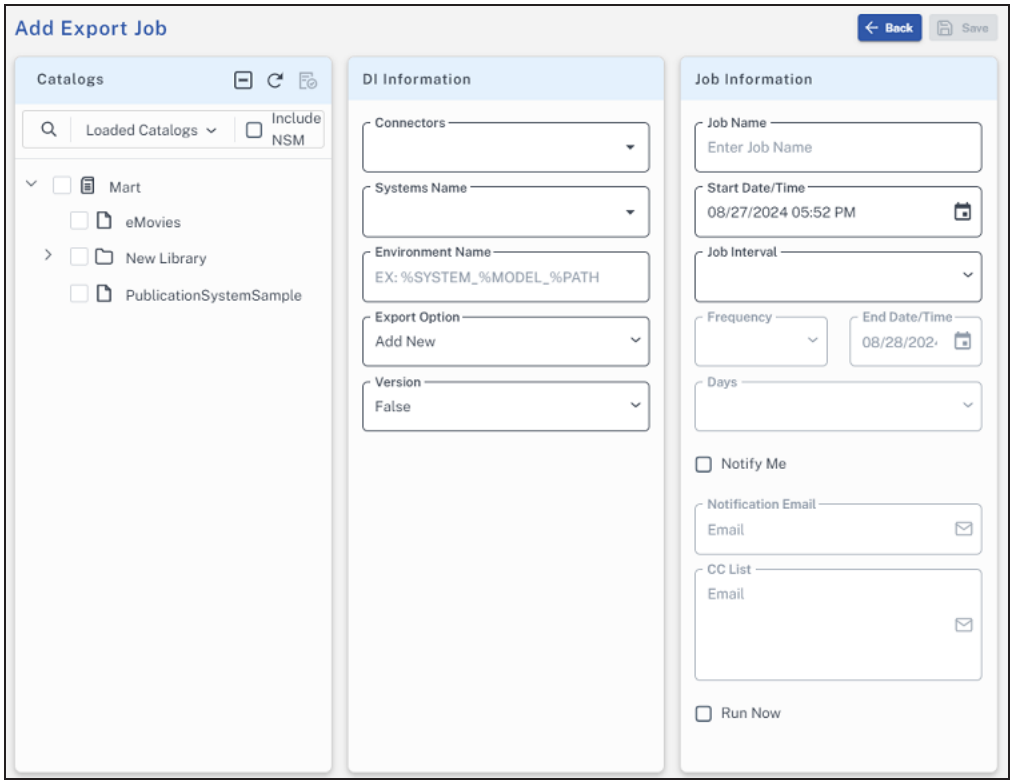
By default the DM Connect for DI app opens in the Calendar view. You can toggle the page view between the List View ( ) or Calendar View ( ) using the respective buttons on the page toolbar.

To schedule jobs, follow these steps:

1. In the header pane, click and then click **DM Connect for DI**.
   The DM Connect for DI page opens.



2. Click a suitable calendar slot or click **Export Job**.
3. Click **Export to DI**.
   The Add Export Job page appears.



4. Set up job parameters as follows:

Tab	Field	Description
Catalogs	Catalog Tree	Select models from mart catalog to export. Before you select models, you can use the All Catalogs or Loaded Catalogs to display all available catalogs or only the expanded catalogs respectively. Apart from that, after you select catalogs, you can click to view only the selected catalogs in the Catalogs section.
	Include NSM	Select whether naming standards must be exported.

Tab	Field	Description
		A catalog named by the NSM file is created under **Business Glossary Manager** > **DM NSM Files** custom asset. Ensure that the DM NSM Files asset is enabled in **erwin DI** > **Business Glossary Manager Settings**.
DI Information	Connectors	Select a configuration to use for the export job.
	Systems Name	Enter a system name. This corresponds to System in Metadata Manager.
	Environment Name	Use the predefined macros to set the environment name. This corresponds to Environment in Metadata manager. For system and environment names, following special characters are allowed: • **System**: - (hyphen), _ (underscore), and space • **Environment**: @ (at sign), $ (dollar sign), & (ampersand), / (slash mark), - (hyphen), _ (underscore), and space All other special characters are replaced with _ (underscore).

	Export Option	Select a suitable export option:
		• **Add New**:
		  • If an environment exists, this option adds any new tables or columns to it.
		  • If an environment does not exist, this option creates an environment and adds tables and

Tab	Field	Description

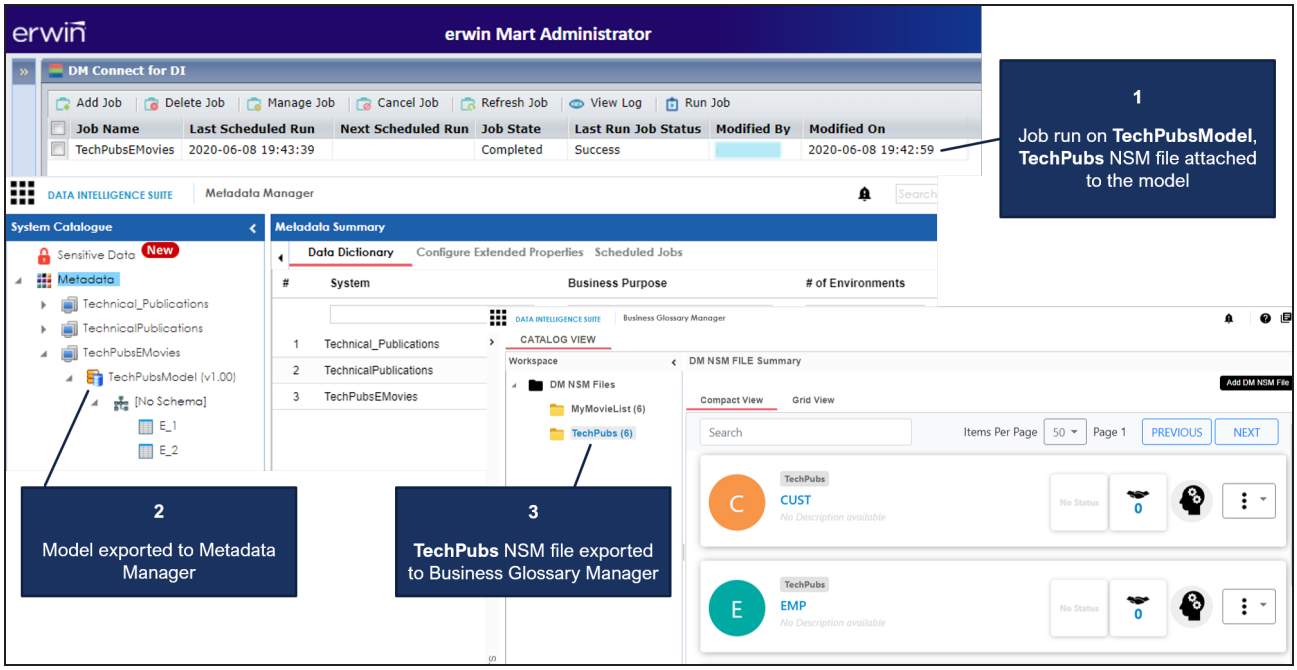
		columns to it.
		• **Update Existing + Add New**:
		  • If the existing model objects have changed, this option exports the updates to the existing model objects in erwin DI .
		  • Also, it exports any new objects in the model to erwin DI .
		• **Update Existing + Add New + Invalidate**:
		Along with the functionality of Update Existing + Add New option, this option invalidates any deleted tables or columns.
		• **Delete & Reload**:
		This option deletes all the tables and columns. Then, it exports them again.

	Version	Select whether a version of an existing environment must be created. This archives the existing environment.

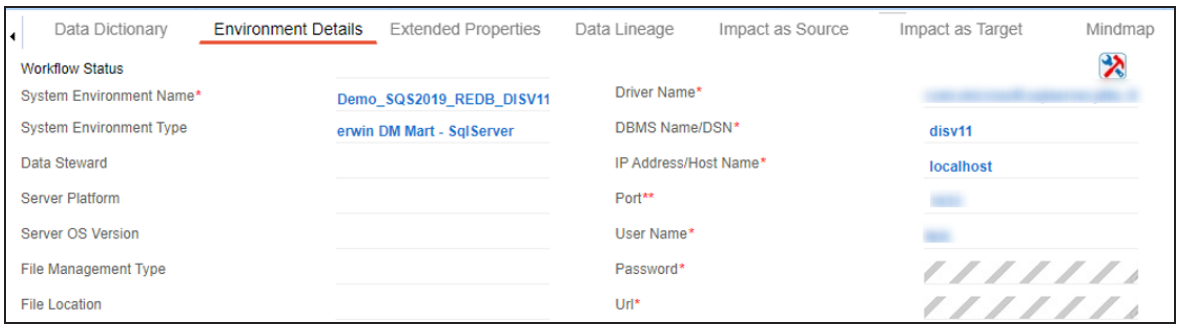
Tab	Field	Description
Job Information	Job Name	Specify a job name.
	Start Date/Time	Select the date and time at which the job must start.
	Job Interval	Select a suitable frequency at which the job must run. You can set the job to run once or recur daily, weekly, monthly, or yearly. You can also set up custom recurrence for jobs.
	Frequency	Select the hourly frequency at which the job should run. This property is available only when you set the Job Interval to Recurring.
	End Date/Time	If you set up recurring jobs, select the date and time at which the recurrence must end.
	Days	Select the days of the week on which the job should run. The days available here depend on the End Date/Time. This property is available only when you set the Job Interval to Recurring.
	Notify Me	Select whether a notification is sent to you when the job status changes. This enables the Notification Email and CC List fields.
	Notification Email	Specify the email address at which you want to receive the notification.
	CC List	Specify a semi-colon-separated list of email addresses that must receive the job notification.
	Run Now	Select the check box to run the job immediately.

5. Click **Save**.
   The job is added to the calendar for execution with its **Job State** set to Scheduled.

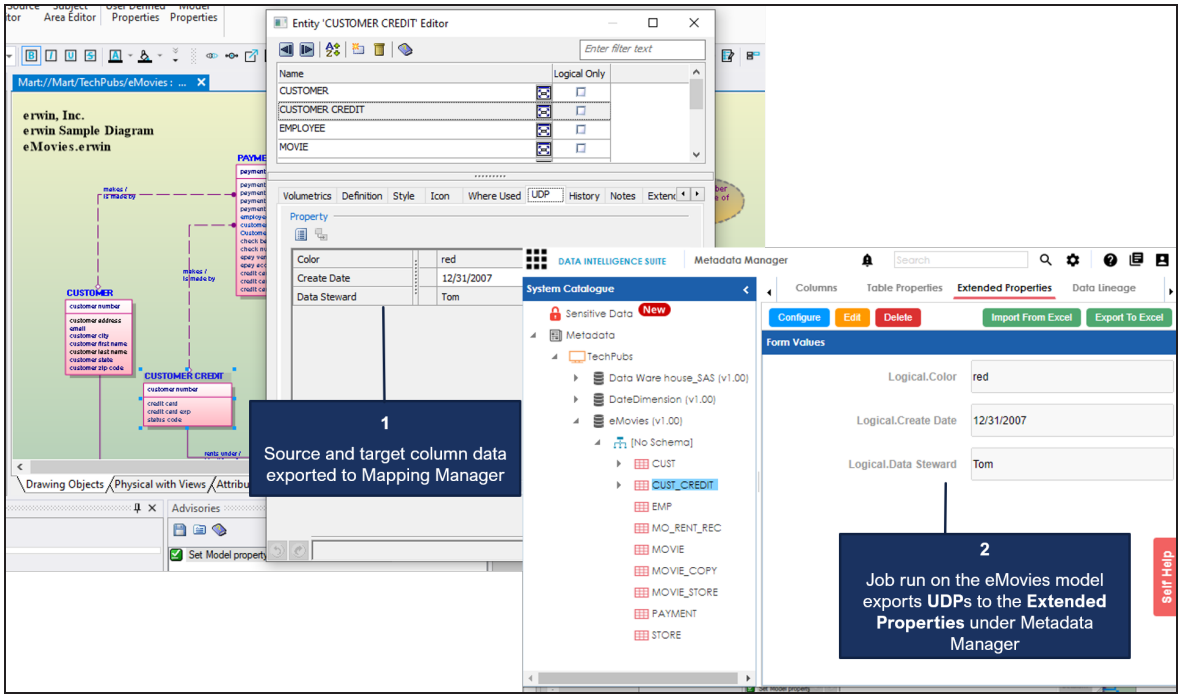
The job runs according to the schedule and exports data model to Metadata Manager and naming standards to Business Glossary Manager.



Database connection parameters such as DBMS Name/DSN, IP Address/Host Name, Port, and Business Entity Type (System Environment Type) are stored in environment details.



Also, the UDPs and validation rules in the model are exported to the Extended Properties tab in Metadata Manager.



Case I: Run Job

The Run Job option immediately runs a job. This option works only if the selected job is a recurring job in the scheduled state.

Case II: Modify Job

The Manage Job option lets you modify an existing scheduled job. If you modify a job:

- before its run schedule, the changes take effect when the job runs
- while it is running, the job is cancelled, and changes are saved. They take effect when the job runs next time.
- after it is past its schedule, the job runs according to the new schedule

Case III: Recurring Job-No Change in Models

Recurring jobs run based on the Job Interval you set while scheduling them. If the models selected in the job have not changed between job intervals, the job still runs according to the schedule. However, no data is exported to erwin DI.

Case IV: New Model in the Folder

If a new model is added to an existing folder on which a recurring job has been scheduled, DM Connect for DI auto-syncs it to the job. The new model in included in the job automatically, when the job runs next.

Scenario: Schedule Jobs to Import Data Models from erwin DI to erwin DM

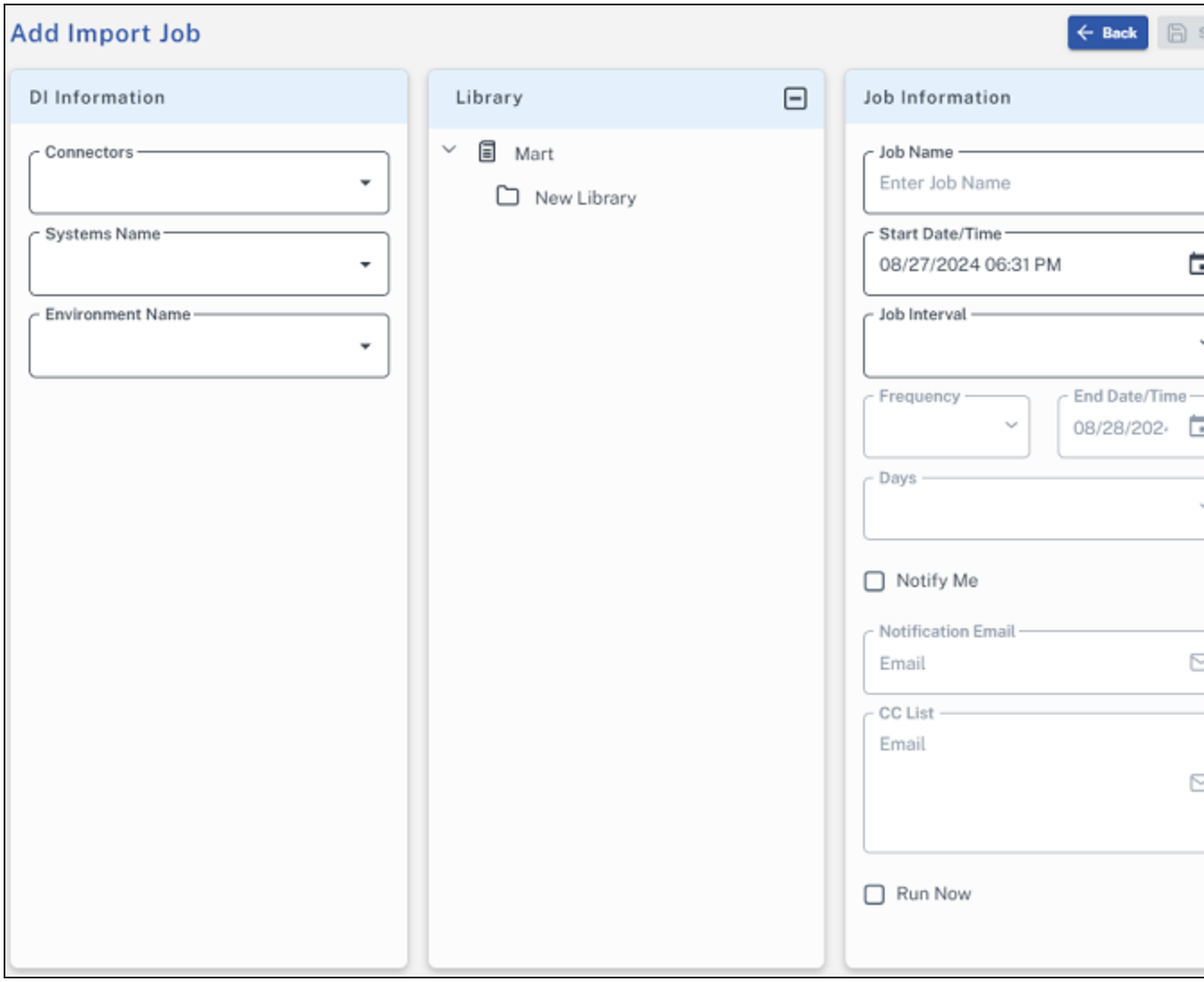
An Import to DM job imports environments and the underlying tables, columns, and metadata to a mart catalog in the original file format as a model. You can then, connect to your mart via erwin DMand open the saved model. erwin DMautomatically converts this model to an erwin model. You can save this model locally or on mart. When you save this model back to the mart, it is saved with the corresponding timestamp.

For more information about data sharing between erwin Data Modeler (erwin DM) and erwin Data Intelligence (erwin DI), refer to the Data Sharing topic.

By default the DM Connect for DI app opens in the Calendar view. You can toggle the page view between the List View ( ) or Calendar View ( ) using the respective buttons on the page toolbar.

To schedule import to DM jobs, follow these steps:

1. In the header pane, click and then click **DM Connect for DI**.
   The DM Connect for DI page opens.
2. Click a suitable calendar slot or click **Import Job**.
3. Click **Import to DM**.
   The Add Import Job page appears.



4. Set up job parameters as follows:

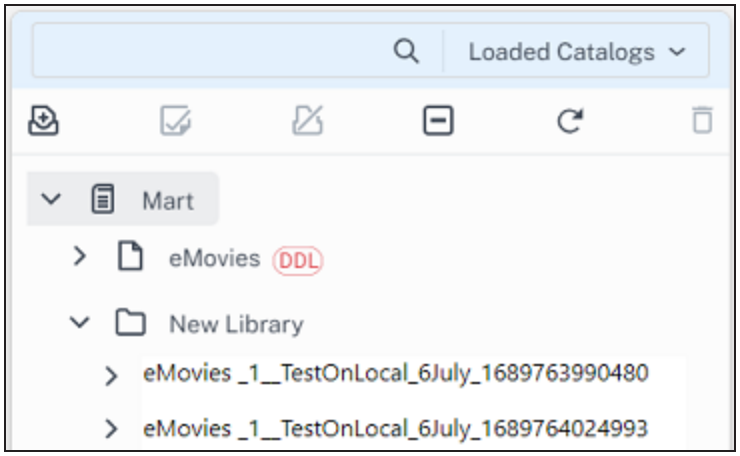
Tab	Field	Description
DI Information	Connectors	Select a configuration to use for the import job.
	Systems Name	Select a system from the list of available systems based on your DI configuration

Tab	Field	Description
	Environment Name	Select one or more environments from the list of available environments based on the selected system.
Library	Select Models	Select the mart catalog/library to import models to.

Tab	Field	Description
Job Information	Job Name	Specify a job name.
	Start Date/Time	Select the date and time at which the job must run.
	Job Interval	Select a suitable frequency at which the job must run. You can set the job to run once or recur daily, weekly, monthly, or yearly. You can also set up custom recurrence for jobs.
	Frequency	Select the hourly frequency at which the job should run. This property is available only when you set the Job Interval to Recurring.
	End Date/Time	If you set up recurring jobs, select the date and time at which the recurrence must end.
	Days	Select the days of the week on which the job should run. The days available here depend on the End Date/Time. This property is available only when you set the Job Interval to Recurring.
	Notify Me	Select whether a notification is sent to you when the job status changes. This enables the Notification Email and CC List fields.
	Notification Email	Specify the email address at which you want to receive the notification.
	CC List	Specify a semi-colon-separated list of email addresses that must receive the job notification.
	Run Now	Select the check box to run the job immediately.

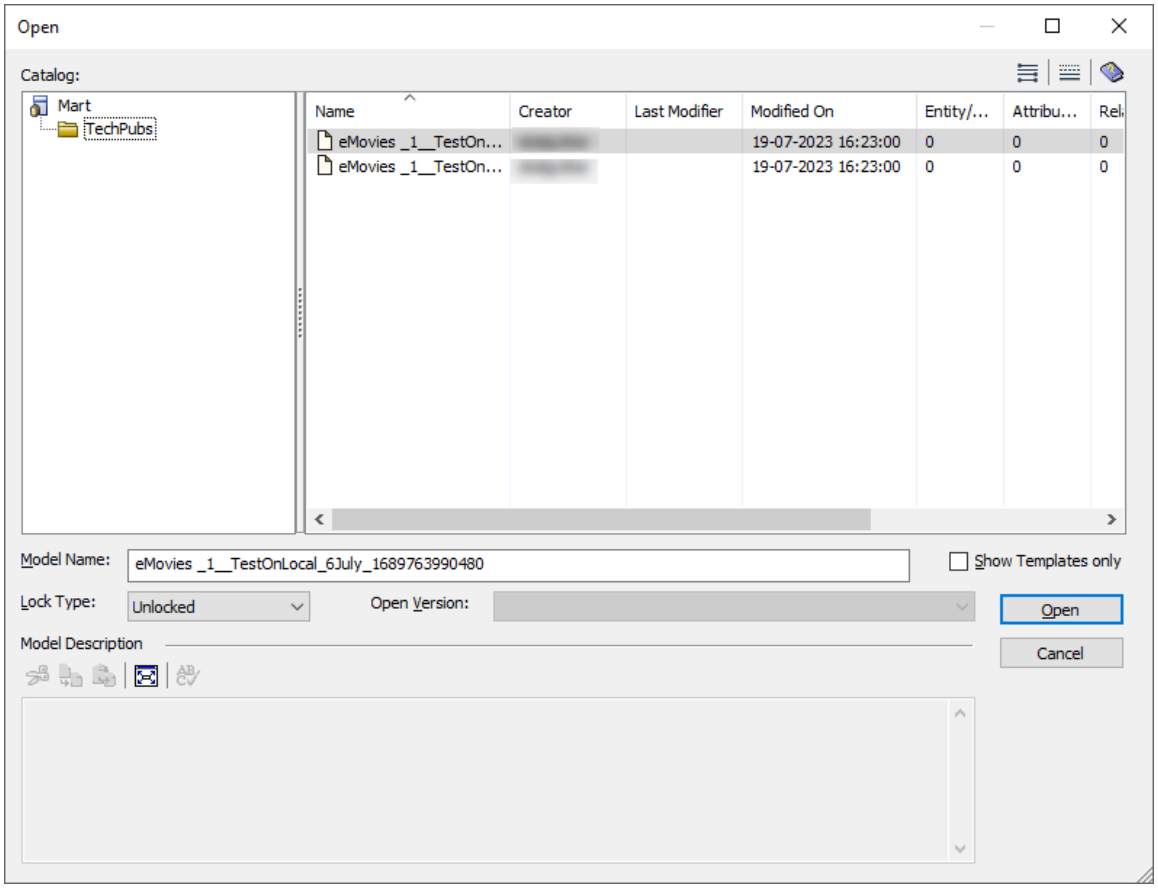
5. Click **Save**.
   The job is added to the calendar for execution with its **Job State** set to Scheduled.

On successful job completion, the imported model is added to the selected library in the original erwin DI format. To use this model, you must convert it to erwin DM format.

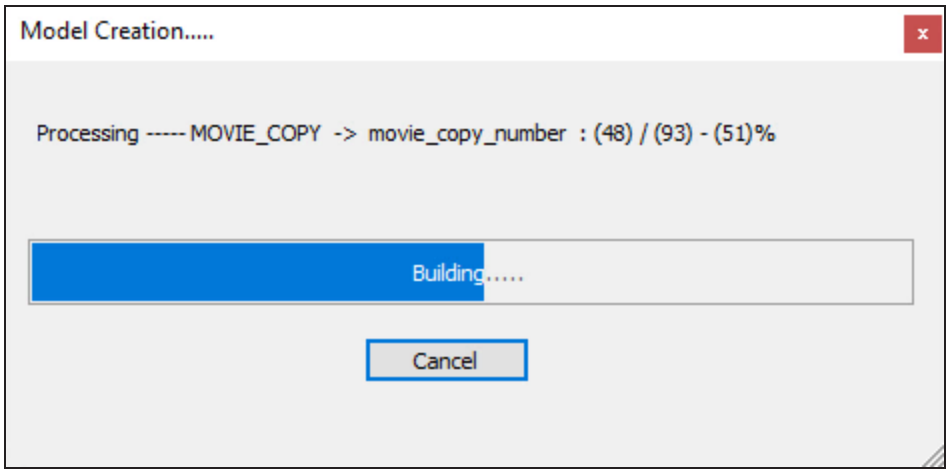


To convert an imported model to erwin DM format, follow these steps:

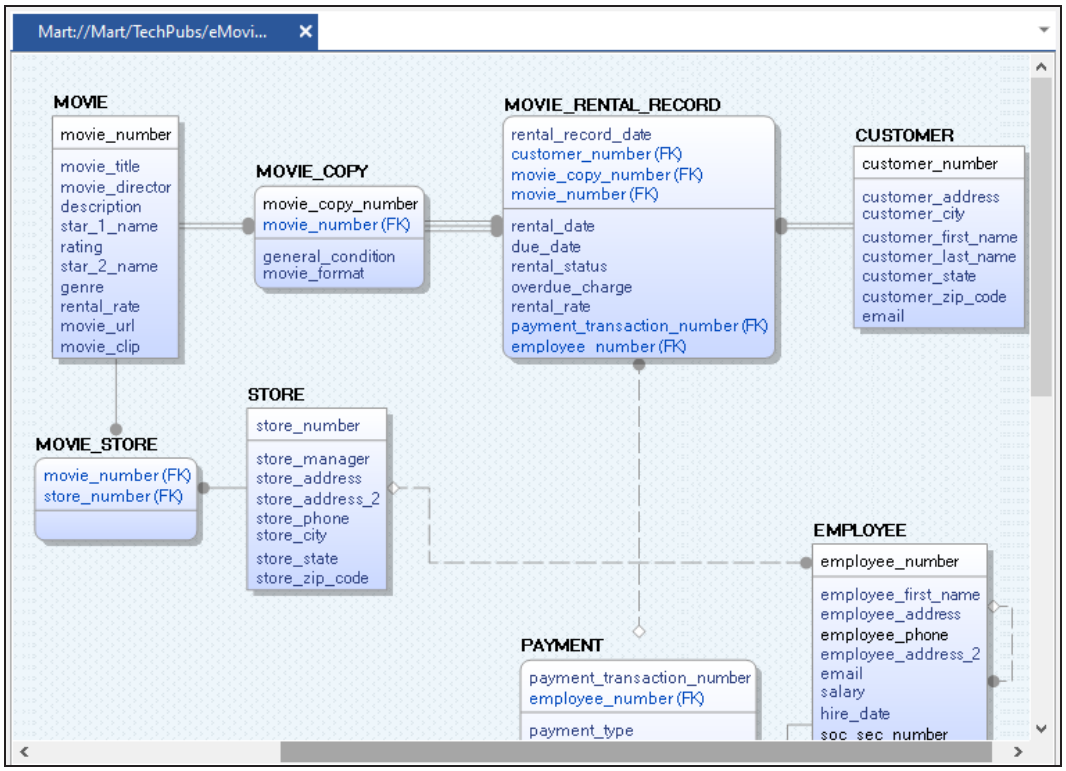
1. Start erwin DM and connect to your mart.
2. On the ribbon, click **Mart** > **Open**.



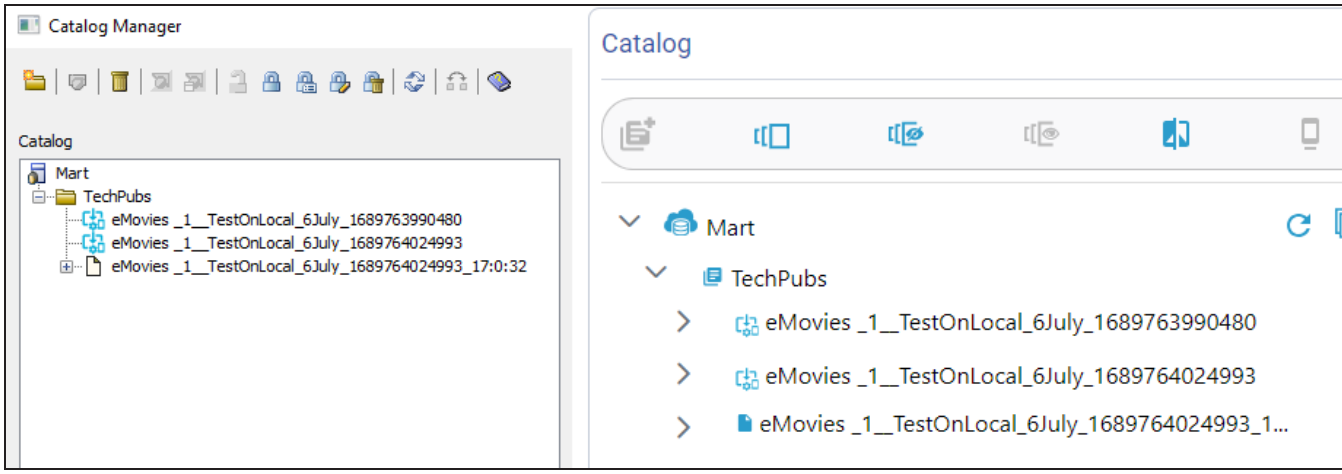
3. Select the required model and click **Open**.
   The process to convert the imported model to the erwin DM format runs.



Once this process is complete, the model is converted to .erwin format and opened in the diagram editor.

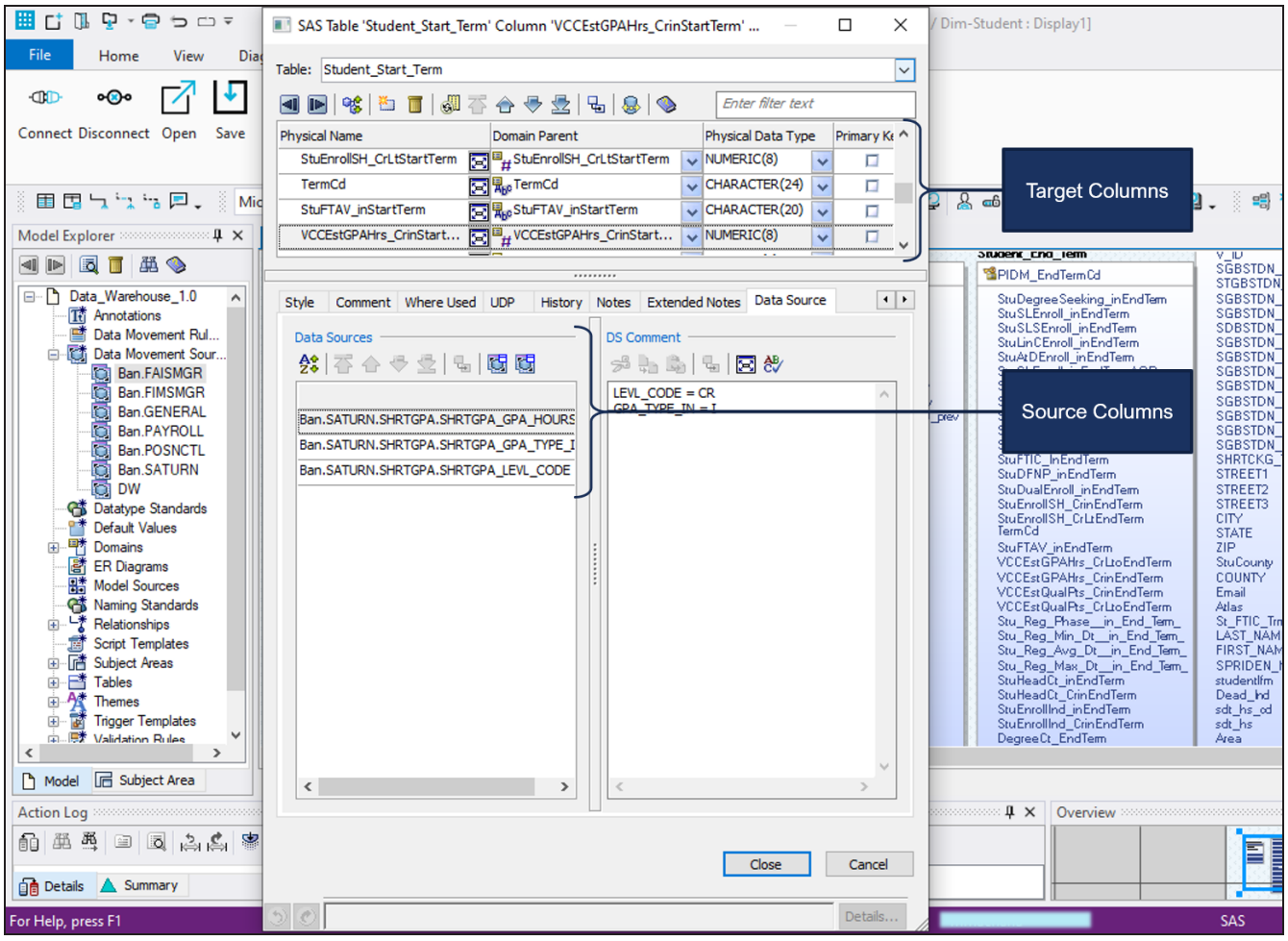


This model is saved to your mart catalog in the .erwin format with a time stamp. The following image shows the saved model in the Catalog Manager and in your mart library.



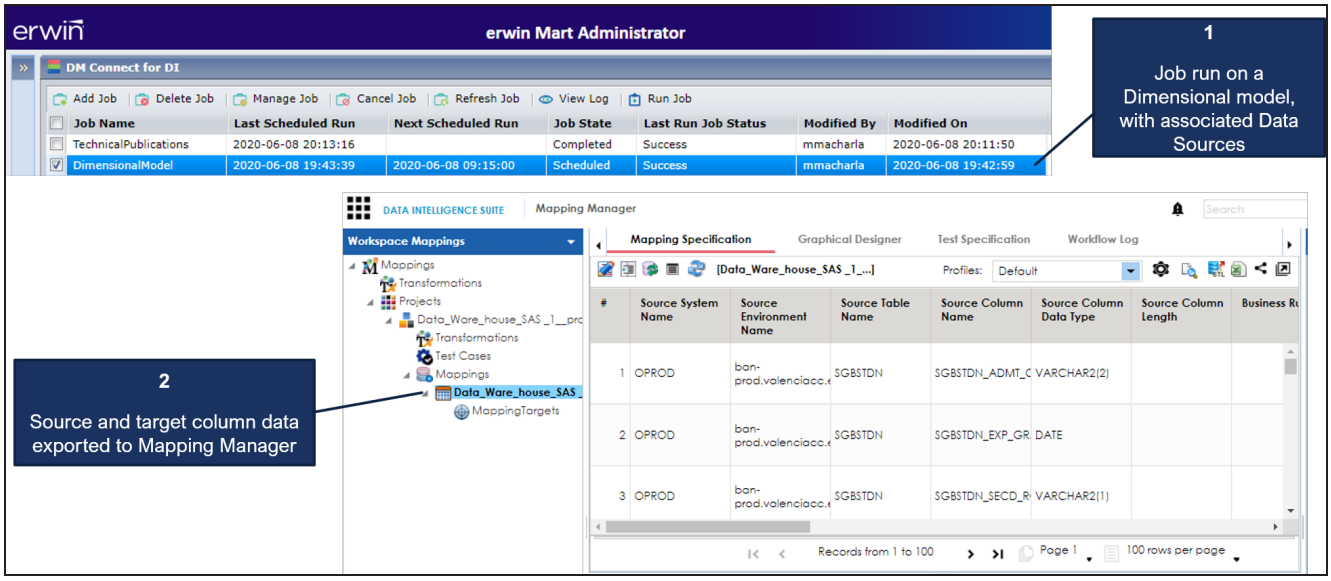
Scenario: Import Source and Target Data into Mapping Manager

In case of dimensional model that has associated data sources, DM Connect for DI exports the source and target column data from the model into the Mapping Manager.



Schedule a job on your dimensional model. Once the job is completed successfully, DM Connect for DI creates a project. Under this project, it creates a mapping specification with the source and target column data from your model.

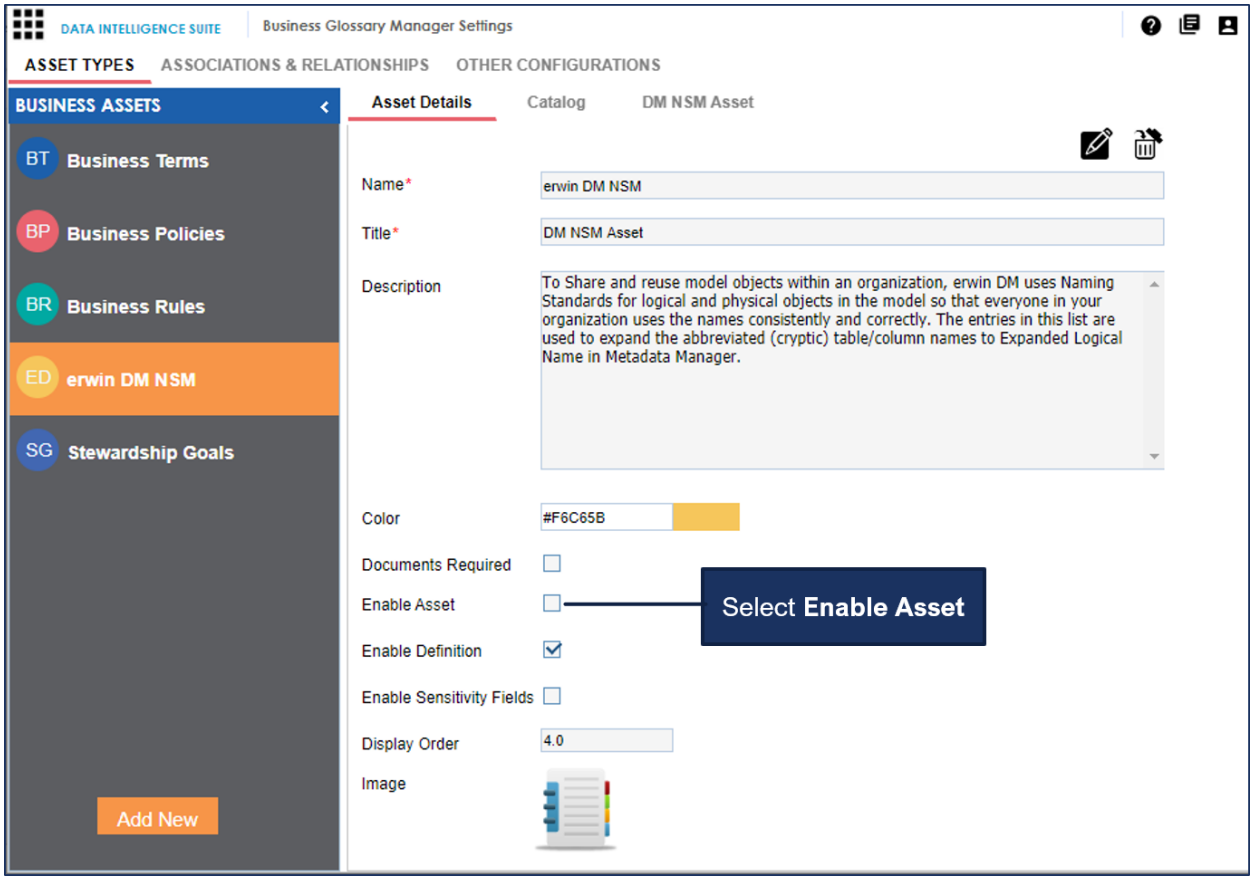
Scenario: Import Source and Target Data into Mapping Manager



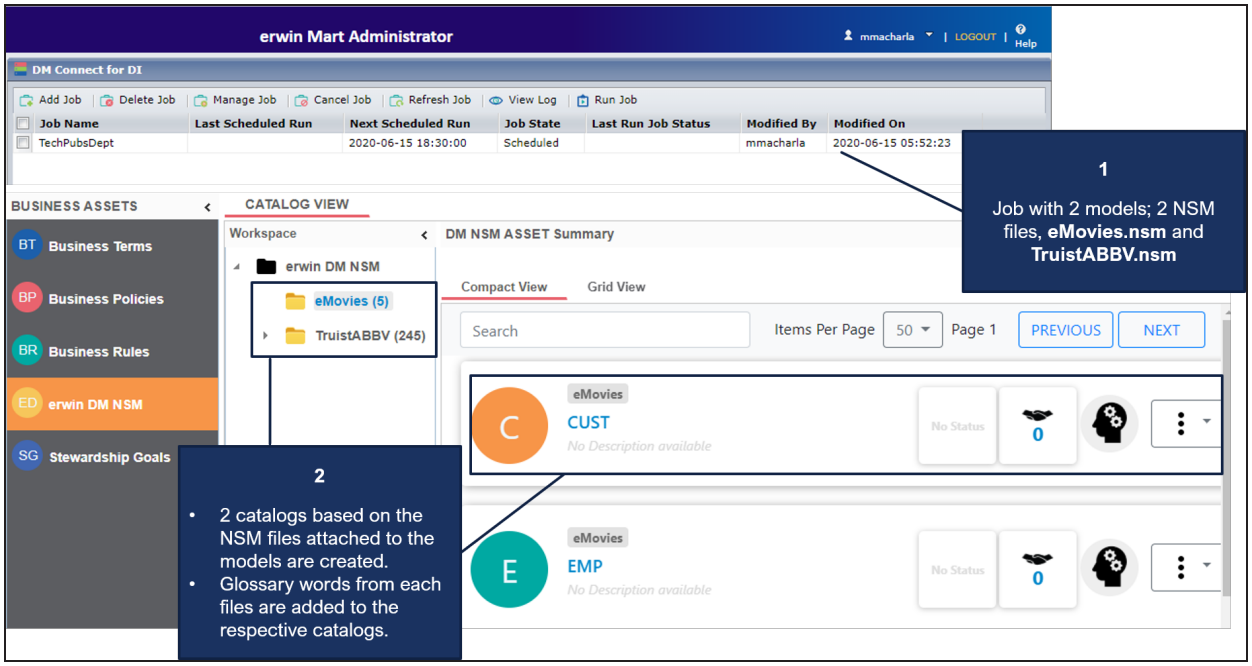
Scenario: NSM Files

If the models selected in a job have NSM files associated with them, DM connect for DI exports them to the Business Glossary Manager under the custom asset, erwin DM NSM.

> Ensure that the erwin DM NSM asset is enabled under **erwin DI** > **Business Glossary Manager Settings**.



Under the erwin DM NSM asset, each unique NSM file is added as a catalog.



Case I: One NSM File, Multiple Models

In a job, if a single NSM file is associated with multiple models, a single catalog is created for both models. The contents of the corresponding catalog under the erwin DM NSM asset type in Business Glossary Manager are overwritten.

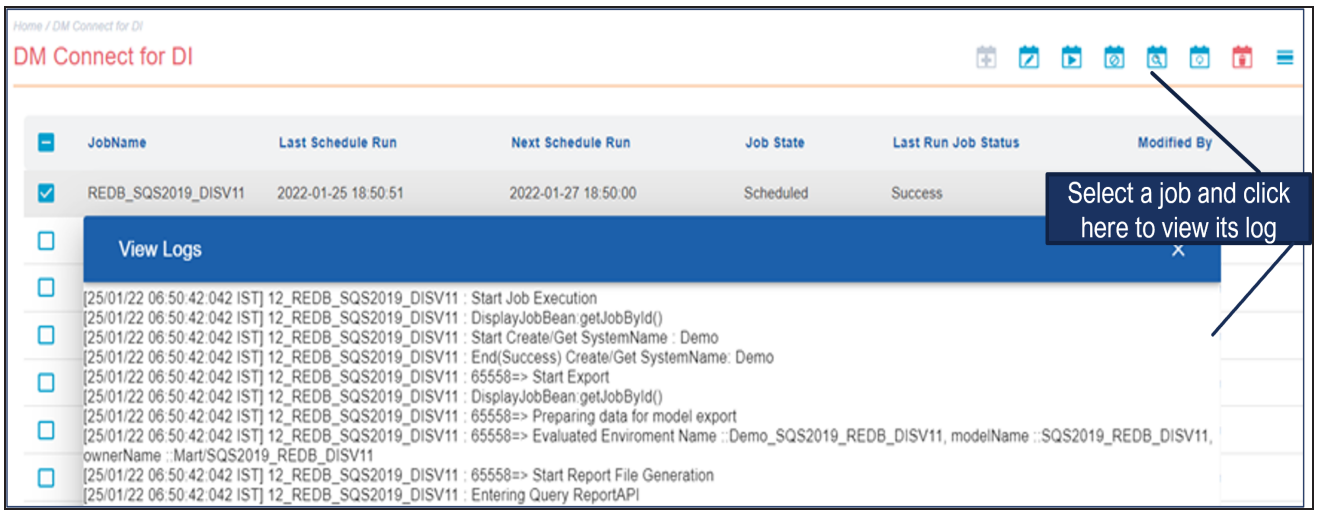
Case II: Multiple NSM Files, Multiple Models

In a job, if multiple NSM files are associated with multiple models, multiple catalogs, corresponding to the NSM files are created under the erwin DM NSM asset type in Business Glossary Manager.

Scenario: View Logs

After a job runs, you can view its log to understand more about the job status. In case of failures, you can then troubleshoot using the logs.

To view a job's log, select a job and click **View Log**.



Reference: Data Sharing between erwin DM and erwin DI

For data to be shared between erwin Data Modeler (DM) and erwin Data Intelligence (DI), the attributes and properties of objects in both the applications must correspond to each other. Refer to the following tables to understand how erwin DM Connect for DI maps data between applications.

LIBRARY-SYSTEM	
erwin Data Modeler	**erwin DI**
Library/Catalog Name	System Name
Description	Business Purpose

MODEL-ENVIRONMENT	
erwin Data Modeler	**erwin DI**
Model Name	System Environment Name
Model Type	System Environment Type
Version	Version
Description	Intended Use Description

TABLE-TABLE	
erwin Data Modeler	**erwin DI**
Model Name	Environment Name
Library Name	System Name
Entity Name	Logical Table Name
Comment	Table Comments
Schema_Name	Schema

COLUMN-COLUMN	
erwin Data Modeler	**erwin DI**
Domain Parent	Data Domain
Physical Data Type	Data Type, Precision, Length, Scale
Null Option	Nullable Flag
Foreign Key	Foreign Key Flag
Primary Key	Primary Key Flag
Child Column Name	Foreign Key Column Name
Child Table Name	Foreign Key Table Name

UDP-EXTENDED PROPERTIES	
erwin Data Modeler	**erwin DI**
UDP Name	Key Name
Value	Value
Description	Description

NSM-erwin DM NSM	
erwin Data Modeler	**erwin DI**
NSM File Name	Catalog Name
Abbreviation	Asset Name
Glossary Word	Definition

NSM files have multiple parameters. However, DM Connect for DI is configured to push only the Glossary Word and Abbreviation to erwin DI.

DATA MOVEMENT SOURCE-MAPPING

Reference: Data Sharing between erwin DM and erwin DI

erwin Data Modeler	erwin DI
Data Source DBMS Type	Database Type
DS Transformations	Business Rule
Library	Target System
Model	Target Environment
Table	Target Table
Column	Target Column
Datatype and Length	Target Column Datatype and length
Source Library (Or Data Source Name)	Source System
Source Model (Or Data Source Server)	Source Environment
Source Table (Or Data Movement Table)	Source Table
Source Column (Or Data Movement Column)	Source Column
Source Column Datatype (Or Data Movement Column Datatype)	Source Column Datatype and length Check whether datatype and length are added to the corresponding fields. If not, you need to correct it manually.

Limitations

The following list summarizes the limitations of erwin DM Connect for DI.

- If table's or column's Definition property is updated in a model, the update is not exported when the job is run again. To export the updated Definition, set the job's Export Options to Delete & Reload.
- When you apply an NSM file to a model, it is applied at the model-level. Therefore, it is applied to all versions of the model.
- When you use the validation rules, enure that the names of valid values do not exceed 200 characters, or the validation rules are not exported to DI.